ITCSO Training Academy

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Contract Audit Follow-Up (CAFU) 3.5

Pre-Defined & Ad hoc Reports

November 2009

Course Topics

Course Topics

Note: Links will ***only*** work in PowerPoint's slide show view.

Module One	**Pre-Defined Reports**
Lesson One	**Overview Of Pre-Defined Reports**
Topic One	How to Access Pre-Defined Reports
Topic Two	Report Formats
Topic Three	Running Pre-Defined Reports
Module Two	**Ad hoc Reports**
Lesson One	**Overview of Ad hoc Reports**
Topic One	Ad hoc Reports Overview
Topic Two	How to Access Ad hoc Reports
Topic Three	Saved Query List
Topic Four	Query Studio Components
Lesson Two	**Query Studio**
Topic One	Query Studio Main Menu
Topic Two	Query Studio Toolbar
Topic Three	Creating Ad hoc Reports
Topic Four	Running Ad hoc Reports

Module One

Pre-Defined Reports

Module One – Objectives

At the end of Module One you should be able to:

- Access Pre-Defined Reports
- View Reports in Four Different Formats
- Run Pre-Defined Reports

Lesson One – Overview of Pre-Defined Reports

Lesson One Topics

Topic One	How to Access Pre-Defined Reports
Topic Two	Report Formats
Topic Three	Running Pre-Defined Reports

Topic One – How to Access Pre-Defined Reports

Accessing CAFU Pre- Defined Reports

CAFU Reporting Interface opens with the Report List displayed (Graphic 1.1).

How to Access the Reports List from within the CAFU Reporting Interface. (Graphic 1.1)	
1.	*Click* the **Reports** link from the reports menu bar. • The Reports List will appear.

Contract Audit Follow-Up 3.5
eTools
Welcome Mary Philpott
HELP | FEEDBACK | EXIT
Reporting Interface 2.0.8
1
Reports | Ad hoc
Report List for Contract Audit Follow-Up
List of reports for this business area.
Report List
View | Report Name | Version Date | Description | Data Refresh
CAFU Added/Deleted Audits | 10 Sep 2009 | This report displays audits that were added and deleted. The transaction message and audit information is displayed. | Immediate
CAFU Audit List | 10 Sep 2009 | Displays information on reportable and non reportable audits by contractor's name, issue date, and status in the CAFU system pipeline. Users can click on the audit number to obtain other details. | Immediate
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CAFU User Access | 10 Sep 2009 | This report displays user access information. The user type, first and last name, and/or the ACO code are displayed. | Immediate
1-14 of 14
HTML Format - best used for viewing on screen; offers better performance.
Excel Format - best used for manual manipulation of data.
Unformatted Excel (CSV) Format - best used for manual manipulation of large data sets.
PDF Format - best used for formatted printing.

Graphic 1.1: CAFU 3.5 Reports Page

Course Topics

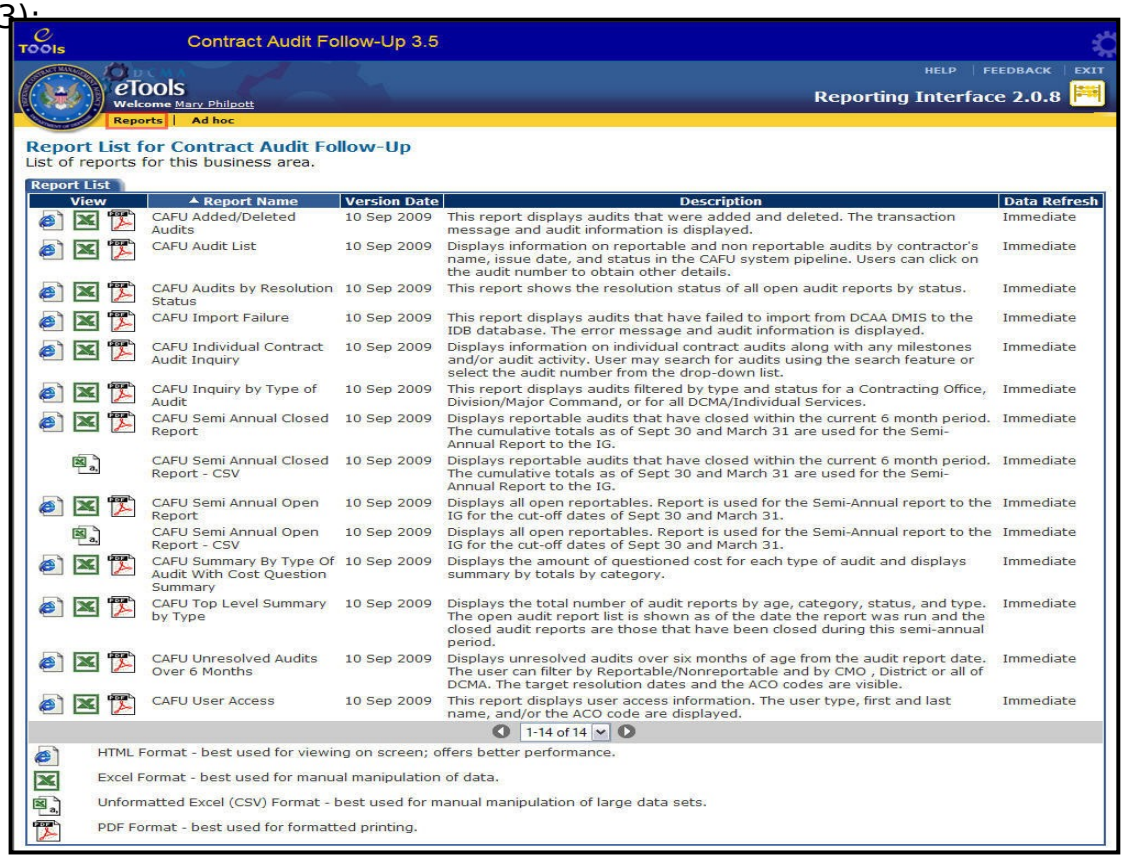
Topic Two – Report Formats

Four Report Formats

Graphic 1.2 shows the Pre-Defined reports for CAFU 3.5. You can view these reports in any of the following four formats (Graphic 1.3):

	HTML Format - best used for viewing on screen; offers better performance.
	Excel Format - best used for manual manipulation of data.
	Unformatted Excel (CSV) Format - best used for manual manipulation of large data sets.
	PDF Format - best used for formatted printing.

Graphic 1.3: Report Formats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Graphic 1.2: Report List

Course Topics

Topic Three – Running Pre-Defined Reports

Select Report and Format Type – Step 1

Locate the Report you would like to view from the Report List.
For demonstration purposes, the ***"CAFU Audits by Resolution Status"*** Report will be selected.

How to select the report format. (Graphic 1.4)	
1.	*Click* the **HTML** button next to the report name. •The report will appear in HTML format
2.	*Click* the **PDF** button next to the report name. • The Reports will appear in PDF format
3.	*Click* the **Excel** button next to the report name. • The Reports will appear in Excel format • From Excel, the file can be saved in CSV format also

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Graphic 1.4: CAFU 3.5 Reports Page

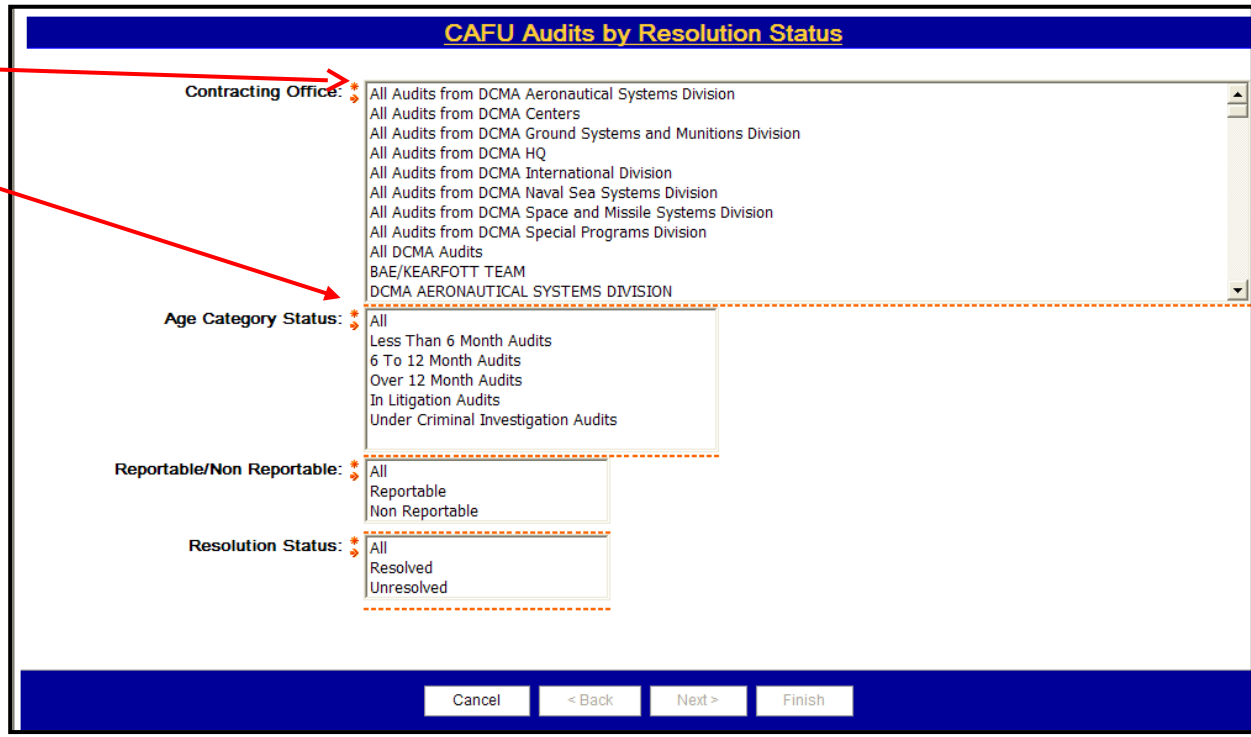
Topic Three – Running Pre-Defined Reports

Setting Report Filters - Step 2

After clicking the report type and view format, the report filter page appears. This page allows you to select specific criteria's for filtering the data you will see on your report.

Filter common elements:

- Fields with an * are required
- A red arrow will appear next to required lists prompting users to make a selection
- Clicking the **Select all** link selects all of the items in the list
- Clicking the **Deselect all** link deselects all of the selected items from the list
- It is recommended **NOT** to select all items for "Optional" lists as it may cause an error or take time to process
- Dynamic lists are not populated until data in a prior list is selected and the cascading prompt button is clicked



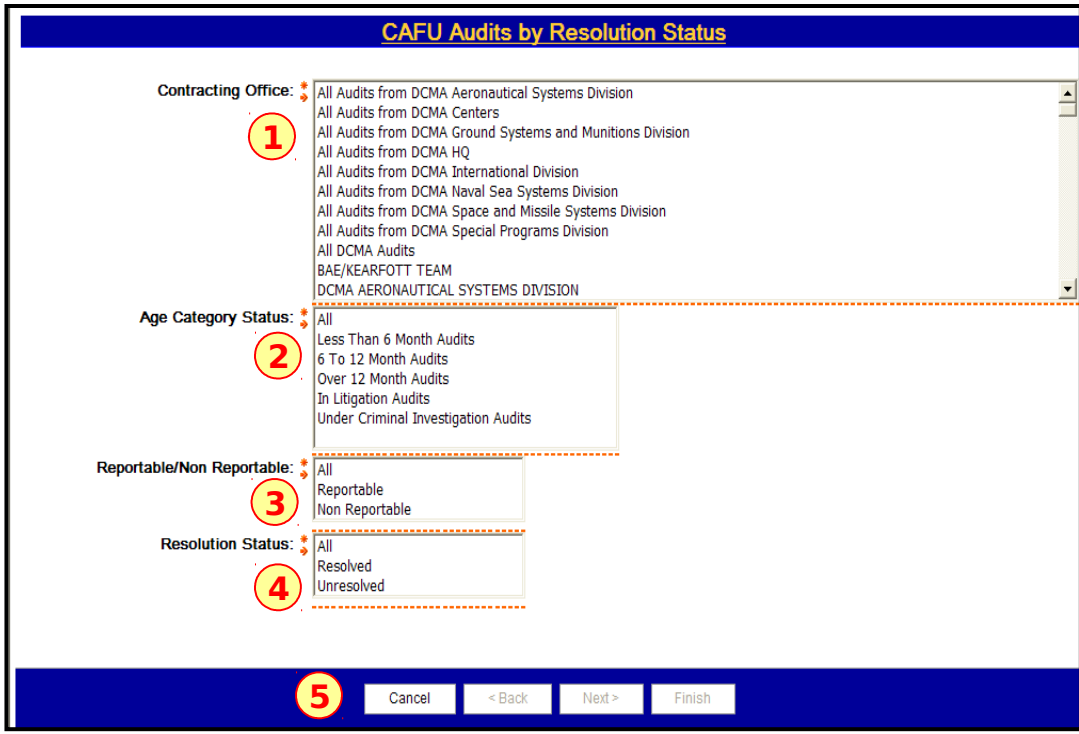
Graphic 1.5: CAFU Report Filter Page

Course Topics

Topic Three – Running Pre-Defined Reports

Setting Report Filters (Continued)

How to filter the CAFU Audits by Resolution Status Report. (Graphic 1.6)	
1.	*Select* the **Contracting Office** from the list.
2.	*Select* the **Age Category Status.**
3.	*Select* the **Reportable/Non-Reportable.**
4.	*Select* the **Resolution Status** from the list.
5.	*Click* on the **Finish** button**.**



Graphic 1.6: CAFU Audits by Resolution Status Report Filter Page

Topic Three – Running Pre-Defined Reports

Viewing Your Completed Report – Step 3

All Reports can be run in a similar process as the steps illustrated in the previous slides.

The results will look similar to those in Graphic 1.7 below.

CAFU Audits by Resolution Status

Contracting Office: All Audits from DCMA HQ
Audit Status: Less Than 6 Month Audits
Report Status: Reportable Resolution Status: Unresolved

Contractor	Report Number	ACO	Report Date	Rep/ Non Rep	Lit	Target Resolution Date	Actual Resolution Date	Cost Question	Updated Cost Question	Cost Sustained	Target Disposition Date	Revised Target Disposition Date
Less Than 6 Month Audits												
DCMA HQ S5102A												
LOCKHEED MARTIN TRAINING SOLUTIONS, INC. (8Y381)	31212006J10100067	Barrera, Luis (Monitor)	Aug 28 2009	R	No			$0.00				
LOCKHEED MARTIN TRAINING SOLUTIONS, INC. (8Y381)	31212006J10100075	Barrera, Luis (Monitor)	Sep 2 2009	R	No			$0.00				
LOCKHEED MARTIN TRAINING SOLUTIONS, INC. (8Y381)	31212006J10100080	Barrera, Luis (Monitor)	Sep 2 2009	R	No			$0.00				
LOCKHEED MARTIN TRAINING SOLUTIONS, INC. (8Y381)	31212006J10100085	Barrera, Luis (Monitor)	Sep 2 2009	R	No			$0.00				
LOCKHEED MARTIN TRAINING SOLUTIONS, INC. (8Y381)	31212006J10100103	Smith, Lawrence (ABH)	Sep 10 2009	R	No			$0.00				

Graphic 1.7: CAFU Audit s by Resolution Status Report Results

Course Topics

Module One Review

Module One Covered the Following Topics:

Topic One	How to Access Pre-Defined Reports
Topic Two	Report Formats
Topic Three	Running Pre-Defined Reports

Module Two

Ad hoc Reports

Module Two – Objectives

At the end of Module Two you should be able to:

- Navigate through Ad hoc Reports
- Access the Components of an Ad hoc Report
- Utilize the Main Menu to Create and Run Reports
- Use the Toolbar Options to Perform Report Functions

Module Two – Ad hoc Reports

Module Two Lessons

Lesson One Overview of Ad hoc Reports

Lesson Two Query Studio

Course Topics

Lesson One – Overview of Ad hoc Reports

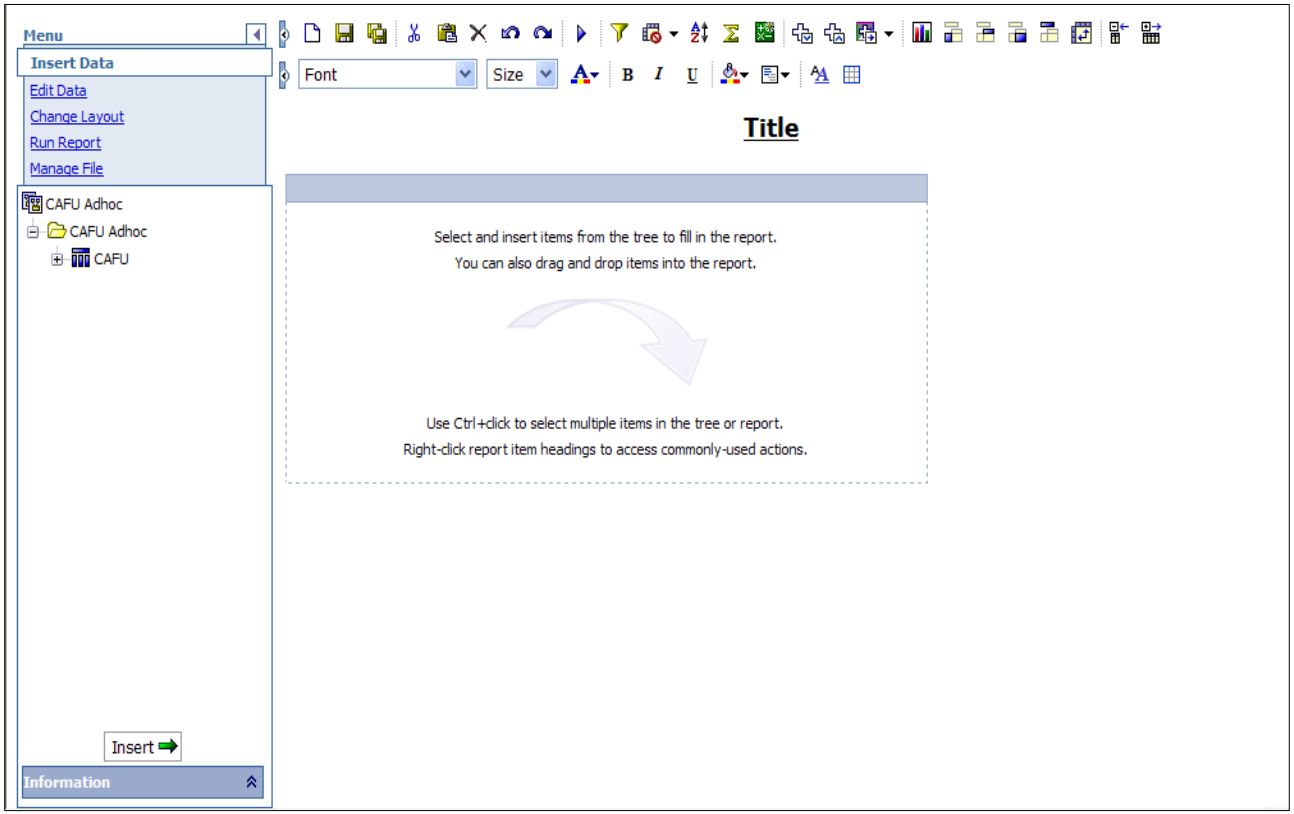
Lesson One Topics

Topic One	Ad hoc Reports Overview
Topic Two	How to Access Ad hoc Reports
Topic Three	Saved Query List
Topic Four	Query Studio Components

Topic One – Ad hoc Reports Overview

Ad hoc Reports Allow:

- The user to customize a data query in real time
- The user to select specific fields and define the search criteria
- The user to create a report view.
- The user to select the web location to publish and save



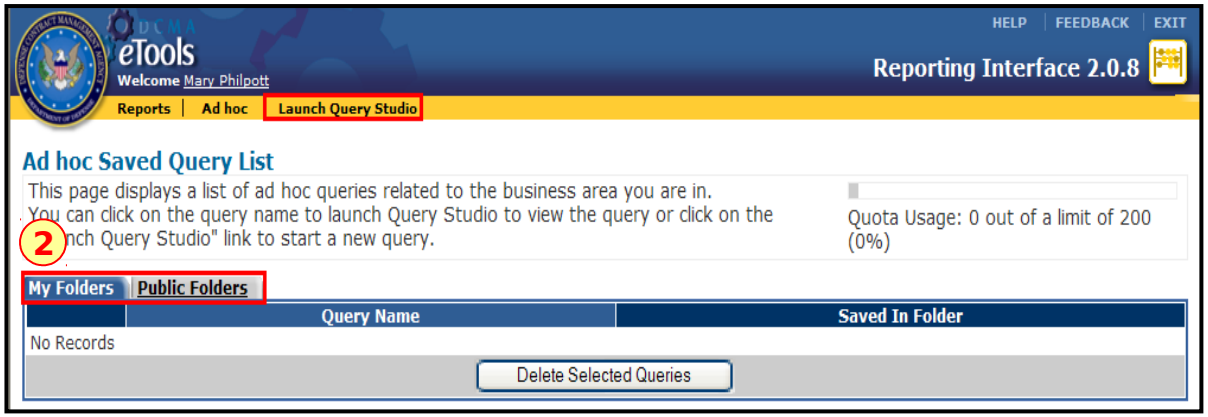
Graphic 2.1: Ad hoc Main Page

Topic Two – How to Access Ad hoc Reports

Accessing Ad hoc Reports from within CAFU Reporting Interface

How to access Ad hoc reports. (Graphics 2.2 -2.5)	
1.	Click on **Ad hoc** on the menu bar. •This action will open the **Ad hoc Saved Query List** page.
2.	To view a saved Ad hoc report from the **My Folders** or **Public Folders** tabs, select the report by clicking on the **Query Name** link. (Graphic 2.3). Graphic 2.4 describes the folder tabs further. **OR**, To create a new Ad hoc report, *click on* the **Launch Query Studio** link to be directed to the Query Studio interface. (Graphic 2.5)

Graphic 2.2: Reports Main Menu


HELP
FEEDBACK
EXIT
eTools
Welcome Mary Philpott
Reporting Interface 2.0.8
Reports
Ad hoc
Launch Query Studio
Ad hoc Saved Query List
This page displays a list of ad hoc queries related to the business area you are in.
You can click on the query name to launch Query Studio to view the query or click on the
nch Query Studio" link to start a new query.
Quota Usage: 0 out of a limit of 200
(0%)
2
My Folders
Public Folders
Query Name
Saved In Folder
No Records
Delete Selected Queries

Graphic 2.3: Ad hoc Main Menu

Course Topics

Topic Three – Saved Query List

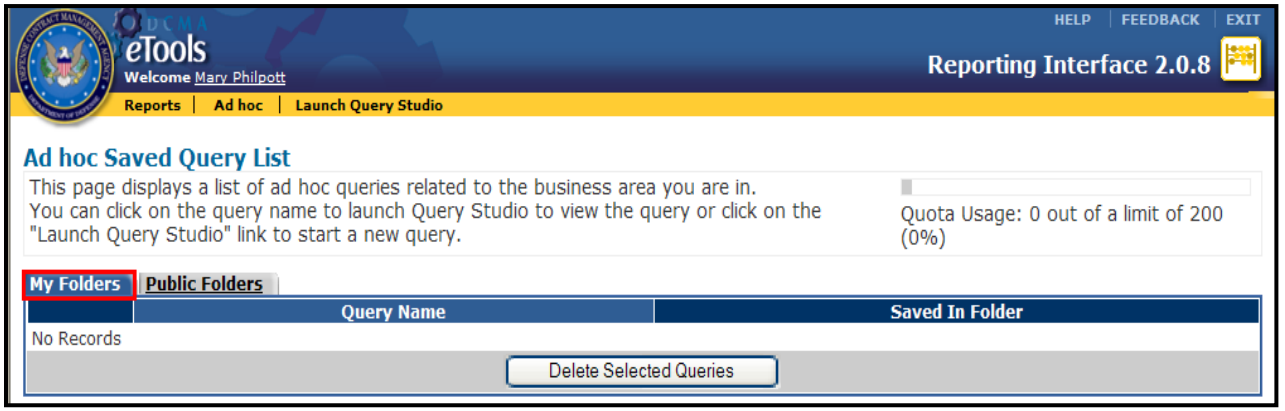
Saved Query List

My Folders

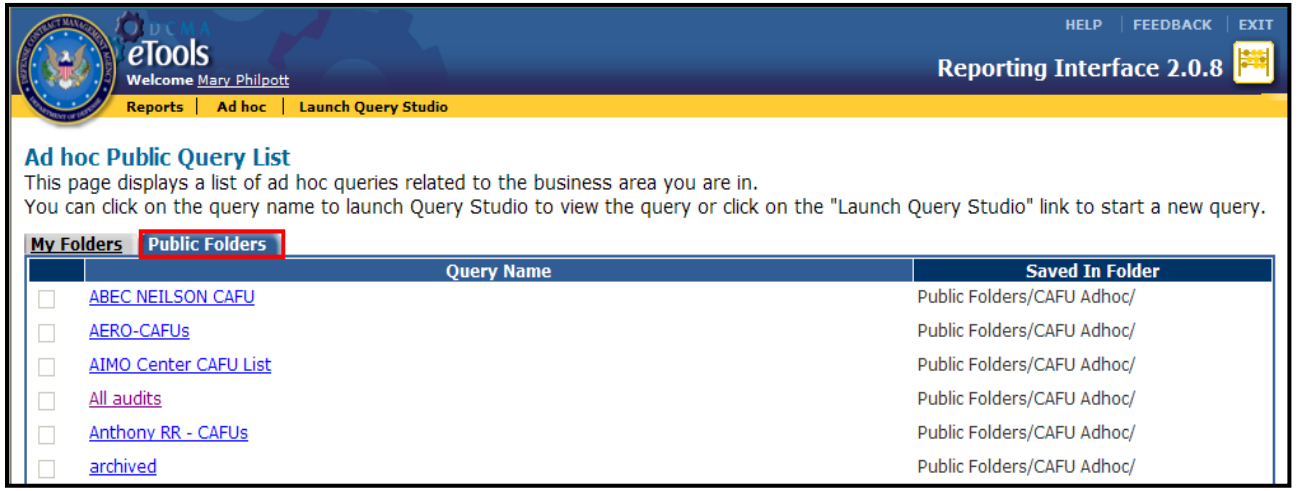
- Only Administrator and the report creator can access reports contained within this tab. (Graphic 2.4)

Public Folders

- Anyone with access to CAFU can run reports in this tab
- It is the default folder for saving Ad hoc reports. (Graphic 2.5)


eTools
Welcome Mary Philpott
HELP | FEEDBACK | EXIT
Reporting Interface 2.0.8
Reports | Ad hoc | Launch Query Studio
Ad hoc Saved Query List
This page displays a list of ad hoc queries related to the business area you are in.
You can click on the query name to launch Query Studio to view the query or click on the "Launch Query Studio" link to start a new query.
Quota Usage: 0 out of a limit of 200 (0%)
My Folders
Public Folders
Query Name
Saved In Folder
No Records
Delete Selected Queries

Graphic 2.4: Ad hoc Saved Query List


eTools
Welcome Mary Philpott
HELP | FEEDBACK | EXIT
Reporting Interface 2.0.8
Reports | Ad hoc | Launch Query Studio
Ad hoc Public Query List
This page displays a list of ad hoc queries related to the business area you are in.
You can click on the query name to launch Query Studio to view the query or click on the "Launch Query Studio" link to start a new query.
My Folders
Public Folders
Query Name
Saved In Folder
ABEC NEILSON CAFU
Public Folders/CAFU Adhoc/
AERO-CAFUs
Public Folders/CAFU Adhoc/
AIMO Center CAFU List
Public Folders/CAFU Adhoc/
All audits
Public Folders/CAFU Adhoc/
Anthony RR - CAFUs
Public Folders/CAFU Adhoc/
archived
Public Folders/CAFU Adhoc/

Graphic 2.5 Ad hoc Saved Query List

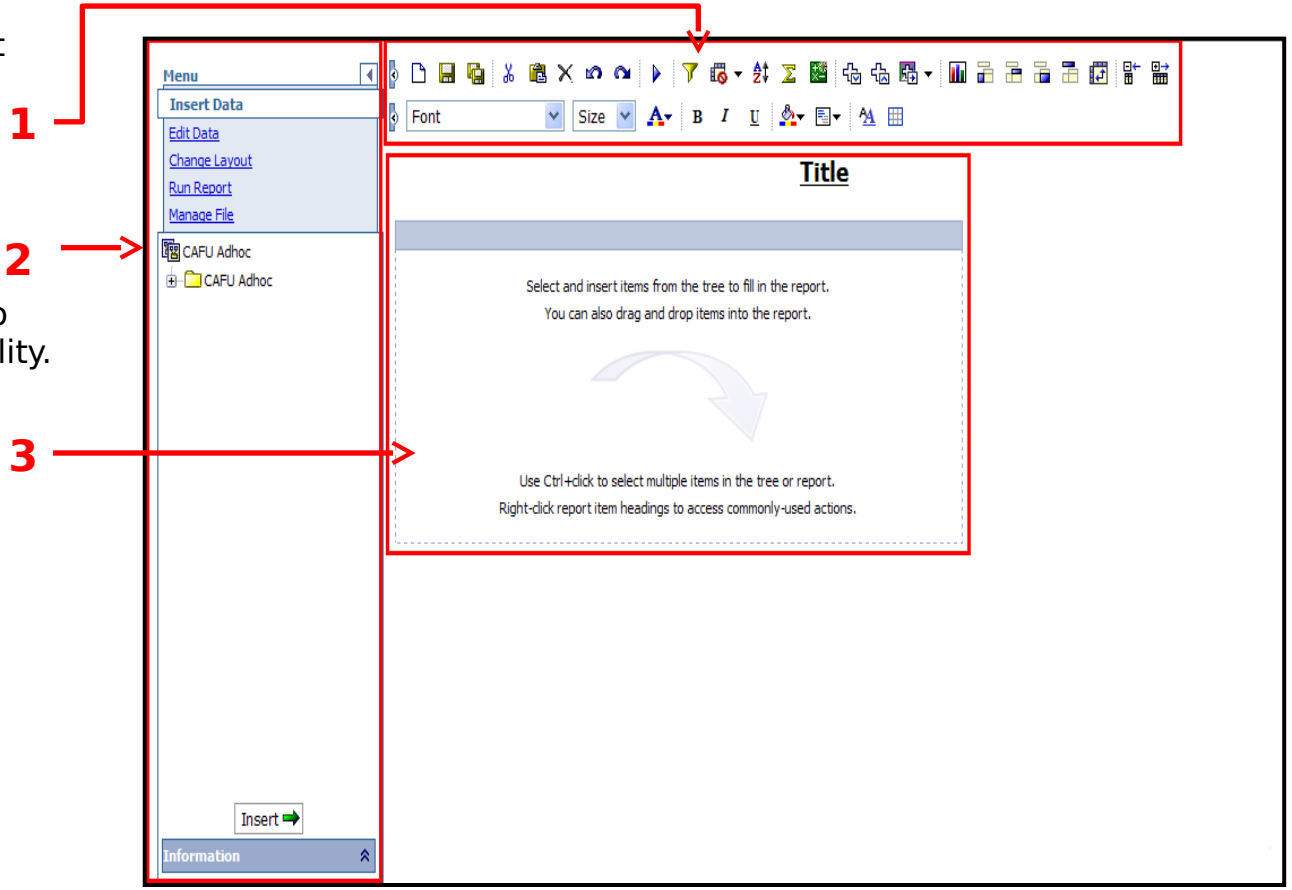
Topic Four – Query Studio Components

Query Studio Components

This diagram depicts the different components for Ad hoc reporting.

1. Toolbar
2. Main Menu
3. Reports Area

The Toolbar provides a shortcut to some of the Main Menu functionality.



Graphic 2.6: Ad hoc Components

Lesson Two – Query Studio

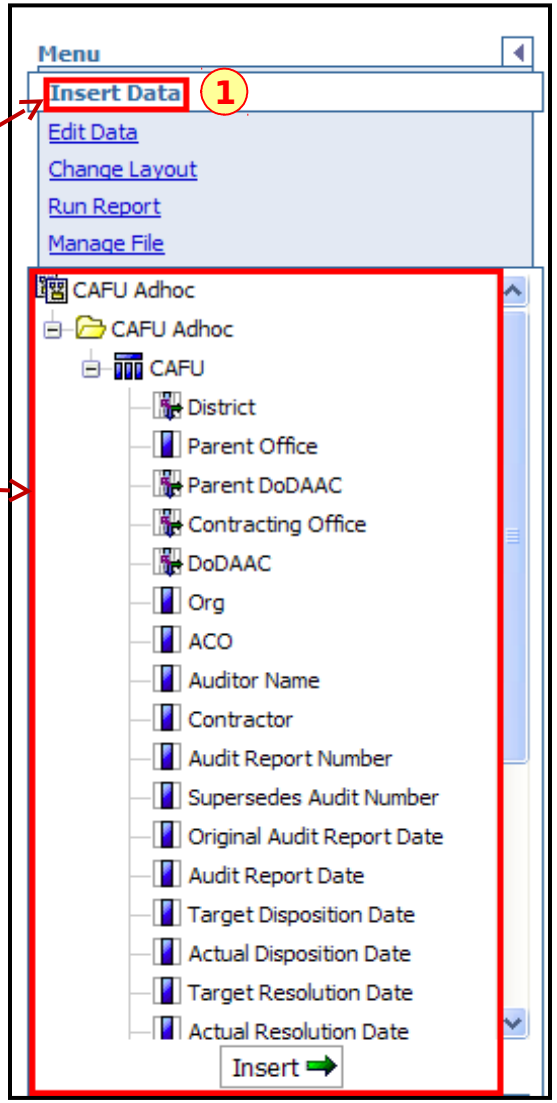
Lesson Two Topics

Topic One	Query Studio Main Menu
Topic Two	Query Studio Toolbar
Topic Three	Creating Ad hoc Reports
Topic Four	Running Ad hoc Reports

Topic One – Query Studio Main Menu

Query Studio Main Menu

How to access Main Menu. (Graphic 2.7)	
1.	Click on the **Insert Data** hyperlink. •This will bring up the data options in the menu that will appear below

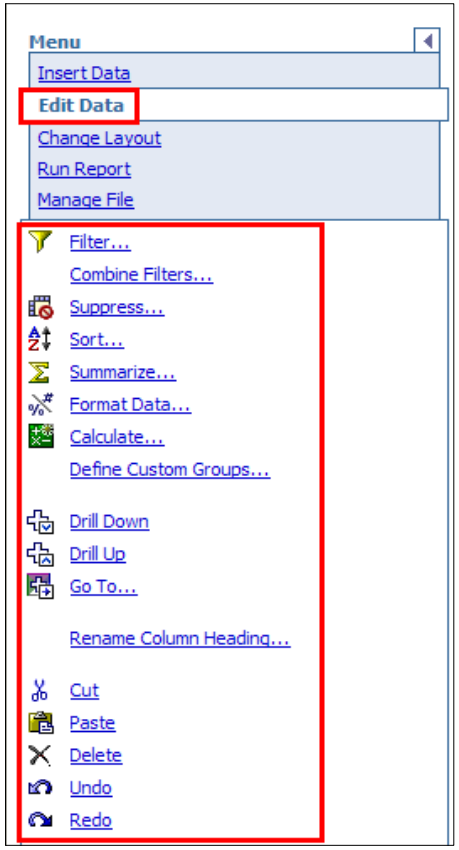


Graphic 2.7: Query Studio Main Menu

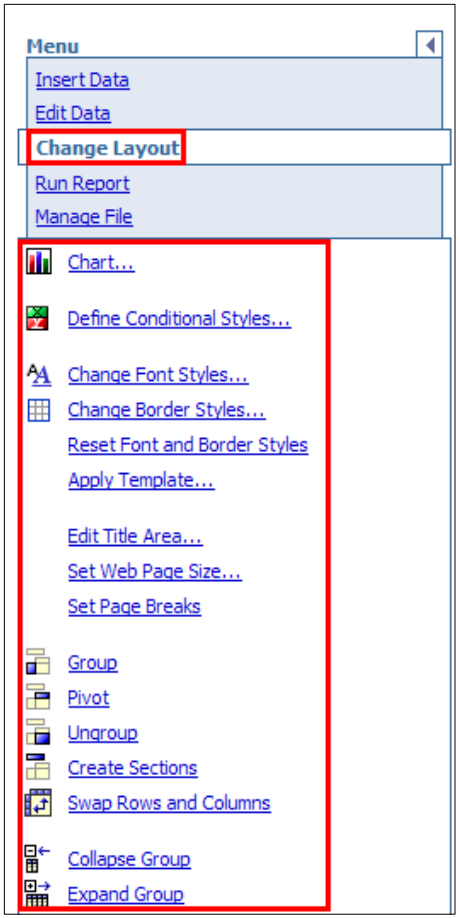
Topic One – Query Studio Main Menu

Query Studio Main Menu (Continued)

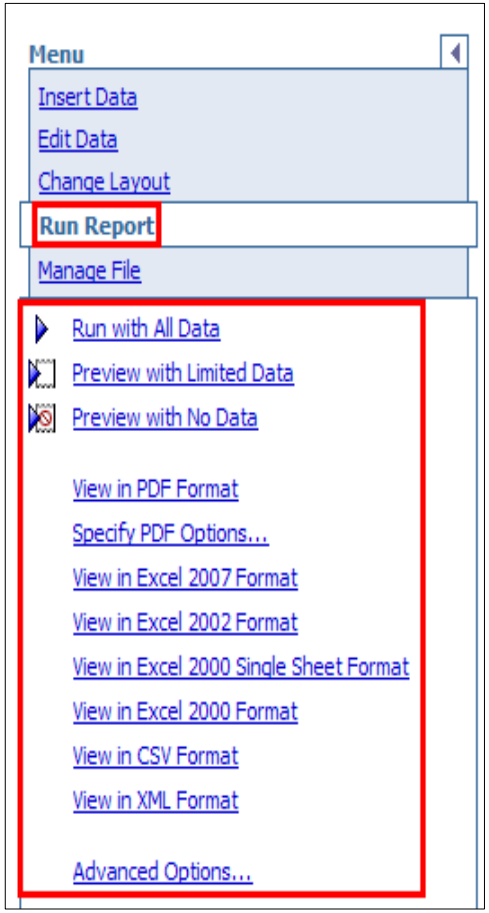
Graphic 2.8 to 2.11 depicts the different main menu options and the corresponding main menu hyperlinks.



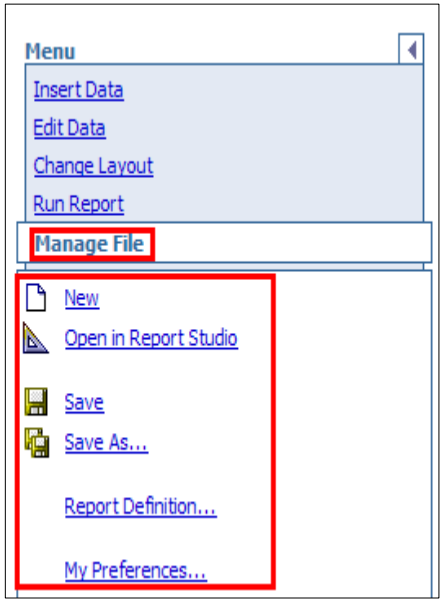
Graphic 2.8: Query Studio Edit Data Main Menu



Graphic 2.9: Query Studio Change Layout Main Menu



Graphic 2.10: Query Studio Run Data Main Menu



Graphic 2.11: Query Studio Manage File Main Menu

Course Topics

Topic Two – Query Studio Toolbar

Using the Query Studio Toolbar

Graphic 2.12 shows the Ad hoc toolbar. Graphic 2.13 highlights the most frequently used icons.

The (save and save as) icons are used to save reports.

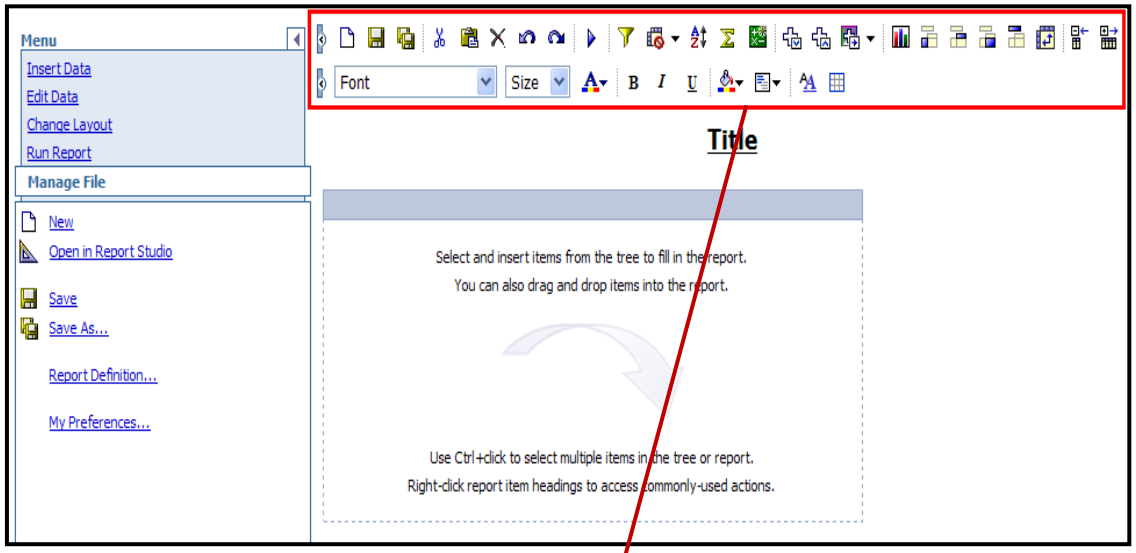
The (cut and paste) icons are used to cut and paste data anywhere on the report.

The (undo and redo) icons are used to undo and redo last changes.

The (run with all data and re-prompt) icon allows you to run the report or re-prompt the report.

The (filter and sort icons) allow you to filter and sort on specific data.

These icons are used to summarize data or calculate.



Graphic 2.12: Ad hoc Toolbar

Graphic 2.13: Ad hoc Toolbar

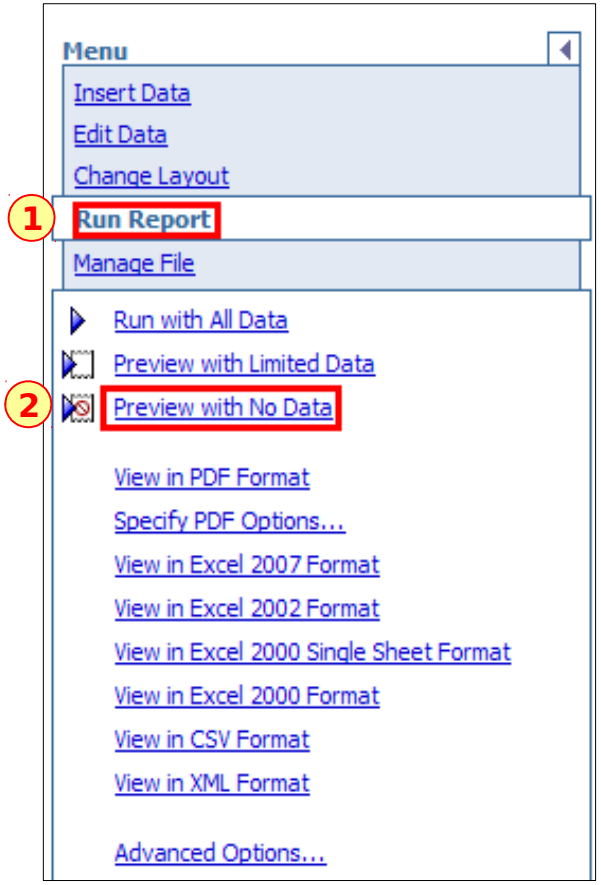
Topic Three – Creating Ad hoc Reports

Selecting No Data before Design – Step 1

The **Run Report** link will give you data view options, allowing you to build a report with all data, limited data, or with no data.

In order to optimize the load time while designing the report, it is recommended to select the **Preview with No Data** options.

How to preview reports with no data. (Graphic 2.14)	
1.	*Click* **Run Report**.
2.	*Select* **Preview with No Data**.

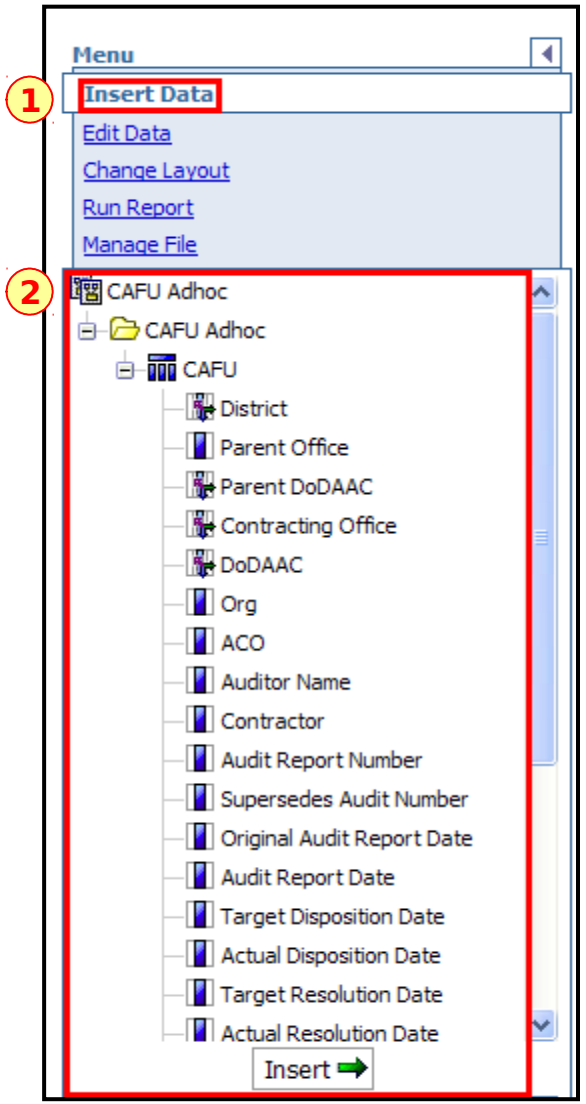


Graphic 2.14: Ad hoc Run Report Menu

Topic Three – Creating Ad hoc Reports

Selecting Data – Step 2

How to select data. (Graphics 2.15)	
1.	*Select* "+" or "-" to expand or collapse the data folders, which contain numerous data tables • Data table is represented icon • Data table can be expanded to reveal data items
2.	*Double-click* the table to insert all fields in the table or double-click an individual data item to only select that table item. **OR**, *Click* the item that will be used in the report and navigate to the bottom of the page and *click* on the **Insert** link. **OR**, *Drag* the data item or folder to the report area.

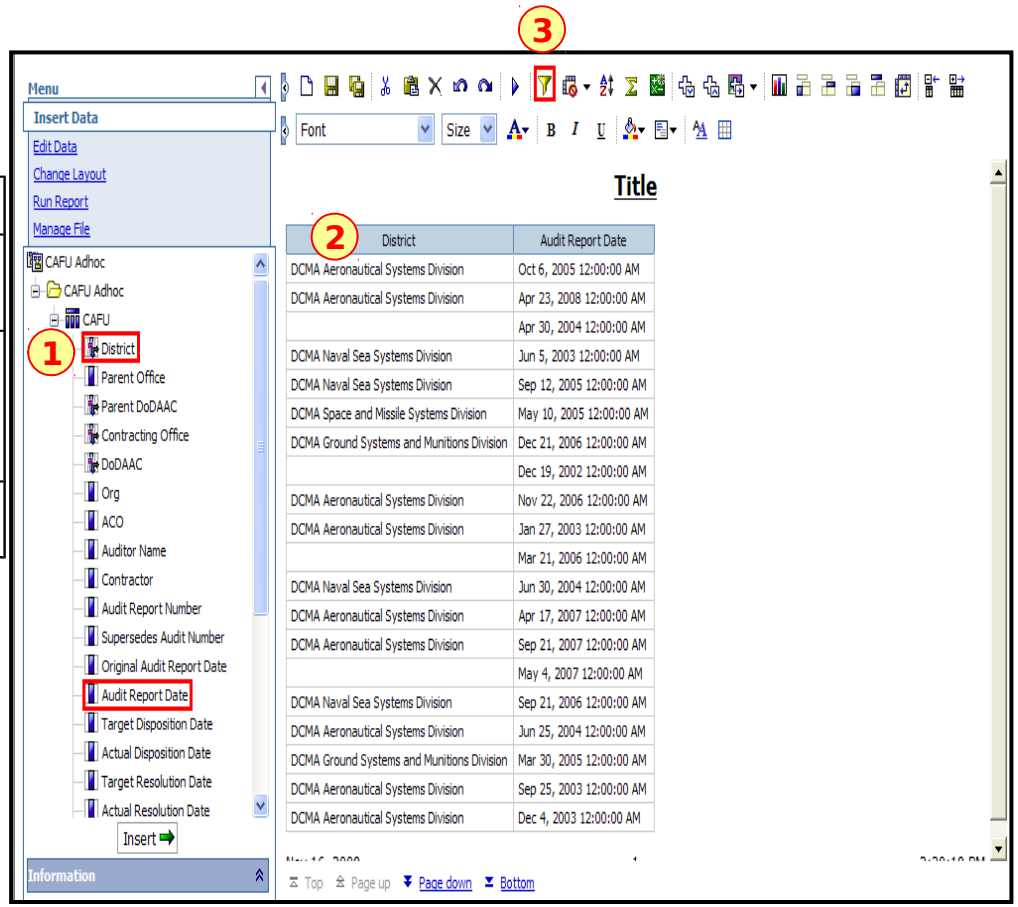


Graphic 2.15: Ad hoc Insert Data Menu

Topic Three – Creating Ad hoc Reports

Filtering Data – Step 3

How to filter data. (Graphic 2.16)	
1.	*Add* the **District** field and **Audit Report Date** to the report area.
2.	*Click* the **District** column header to select the column. • The District column will now be highlighted.
3.	*Click* the *icon.*


3
Menu
Insert Data
Edit Data
Change Layout
Run Report
Manage File
CAFU Adhoc
CAFU Adhoc
CAFU
1
District
Parent Office
Parent DoDAAC
Contracting Office
DoDAAC
Org
ACO
Auditor Name
Contractor
Audit Report Number
Supersedes Audit Number
Original Audit Report Date
Audit Report Date
Target Disposition Date
Actual Disposition Date
Target Resolution Date
Actual Resolution Date
Insert
Information
Font
Size
Title
2
District
Audit Report Date
DCMA Aeronautical Systems Division Oct 6, 2005 12:00:00 AM
DCMA Aeronautical Systems Division Apr 23, 2008 12:00:00 AM
Apr 30, 2004 12:00:00 AM
DCMA Naval Sea Systems Division Jun 5, 2003 12:00:00 AM
DCMA Naval Sea Systems Division Sep 12, 2005 12:00:00 AM
DCMA Space and Missile Systems Division May 10, 2005 12:00:00 AM
DCMA Ground Systems and Munitions Division Dec 21, 2006 12:00:00 AM
Dec 19, 2002 12:00:00 AM
DCMA Aeronautical Systems Division Nov 22, 2006 12:00:00 AM
DCMA Aeronautical Systems Division Jan 27, 2003 12:00:00 AM
Mar 21, 2006 12:00:00 AM
DCMA Naval Sea Systems Division Jun 30, 2004 12:00:00 AM
DCMA Aeronautical Systems Division Apr 17, 2007 12:00:00 AM
DCMA Aeronautical Systems Division Sep 21, 2007 12:00:00 AM
May 4, 2007 12:00:00 AM
DCMA Naval Sea Systems Division Sep 21, 2006 12:00:00 AM
DCMA Aeronautical Systems Division Jun 25, 2004 12:00:00 AM
DCMA Ground Systems and Munitions Division Mar 30, 2005 12:00:00 AM
DCMA Aeronautical Systems Division Sep 25, 2003 12:00:00 AM
DCMA Aeronautical Systems Division Dec 4, 2003 12:00:00 AM
Top
Page up
Page down
Bottom

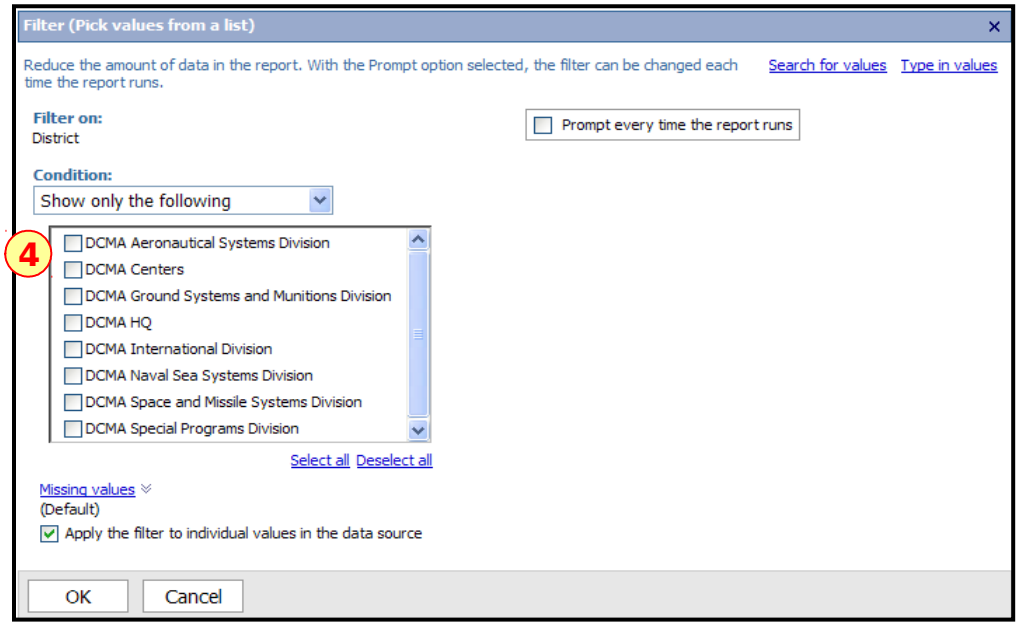
Graphic 2.16: Unfiltered Report

Topic Three – Creating Ad hoc Reports

Filtering Data – Step 3 (Continued)

How to filter data. (Graphic 2.17)	
4.	Check **DCMA Aeronautical Systems Division** and *click* on the OK button to apply the filter.

Note: *Report data should be filtered to avoid retrieving too many records and causing a fatal error.*

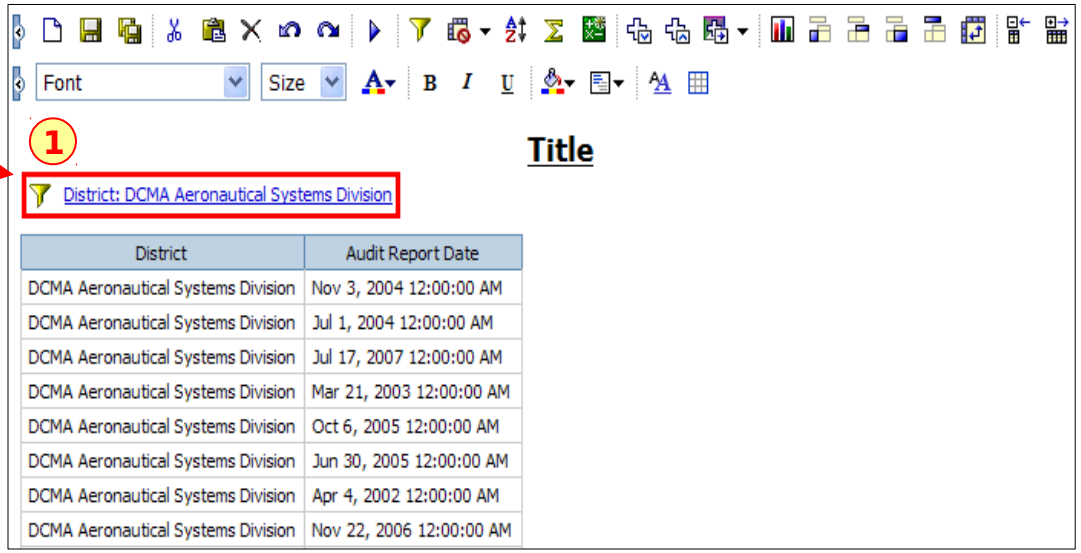

Filter (Pick values from a list)
Reduce the amount of data in the report. With the Prompt option selected, the filter can be changed each time the report runs.
Search for values
Type in values
Filter on:
District
Prompt every time the report runs
Condition:
Show only the following
4
DCMA Aeronautical Systems Division
DCMA Centers
DCMA Ground Systems and Munitions Division
DCMA HQ
DCMA International Division
DCMA Naval Sea Systems Division
DCMA Space and Missile Systems Division
DCMA Special Programs Division
Select all
Deselect all
Missing values
(Default)
Apply the filter to individual values in the data source
OK
Cancel

Graphic 2.17: Filter Screen

Topic Three – Creating Ad hoc Reports

Removing a Filter

How to remove a filter. (Graphic 2.18)	
1.	*Click* the Filter link. • The Filter screen (Graphic 2.17) will be displayed with the current filter option checked
2.	*Click* the box to the left of **DCMA Aeronautical Systems Division** to remove the check mark.
3.	*Click* the OK button to remove the filter.



Graphic 2.18: Filtered Report

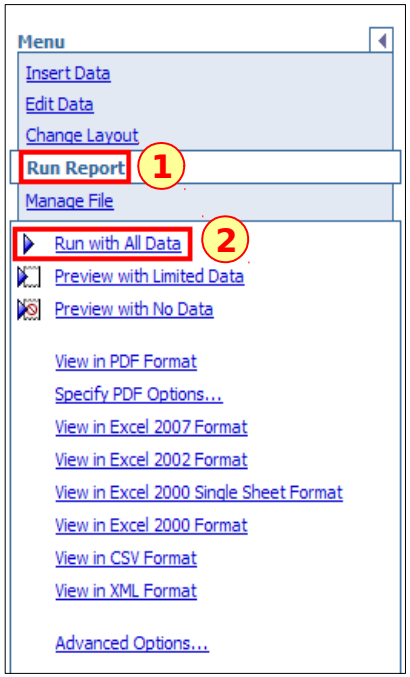
Topic Four – Running Ad hoc Reports

How to Run Ad hoc Reports With All Data

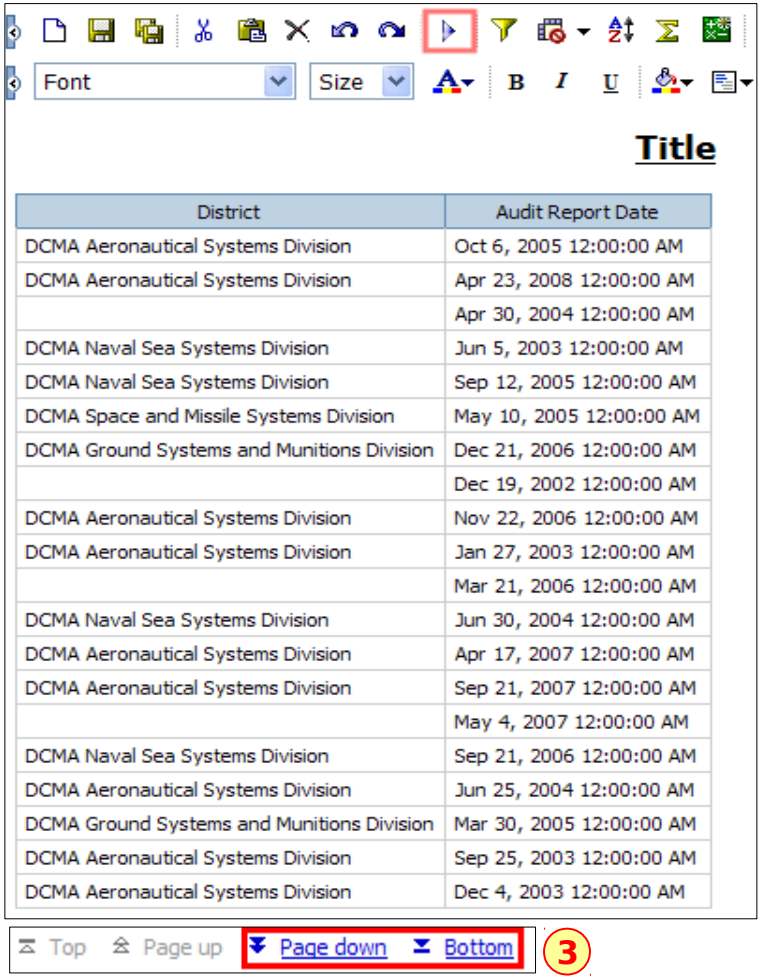
The **Run Report** link will give you data view options, allowing you to build a report with all data, limited data, or with no data.

Once you are satisfied with the layout of your report you are ready to run the report with **all data**.

How to run report with all data. (Graphic 2.19 – 2.20)	
1.	*Click* **Run Report**.
2.	*Select* **Run with All Data** or click on the toolbar.
3.	Use the Page down link to view additional report pages.



Graphic 2.19: Ad hoc Run Report Menu


Font
Size
Title
District
Audit Report Date
DCMA Aeronautical Systems Division
Oct 6, 2005 12:00:00 AM
DCMA Aeronautical Systems Division
Apr 23, 2008 12:00:00 AM
Apr 30, 2004 12:00:00 AM
DCMA Naval Sea Systems Division
Jun 5, 2003 12:00:00 AM
DCMA Naval Sea Systems Division
Sep 12, 2005 12:00:00 AM
DCMA Space and Missile Systems Division
May 10, 2005 12:00:00 AM
DCMA Ground Systems and Munitions Division
Dec 21, 2006 12:00:00 AM
Dec 19, 2002 12:00:00 AM
DCMA Aeronautical Systems Division
Nov 22, 2006 12:00:00 AM
DCMA Aeronautical Systems Division
Jan 27, 2003 12:00:00 AM
Mar 21, 2006 12:00:00 AM
DCMA Naval Sea Systems Division
Jun 30, 2004 12:00:00 AM
DCMA Aeronautical Systems Division
Apr 17, 2007 12:00:00 AM
DCMA Aeronautical Systems Division
Sep 21, 2007 12:00:00 AM
May 4, 2007 12:00:00 AM
DCMA Naval Sea Systems Division
Sep 21, 2006 12:00:00 AM
DCMA Aeronautical Systems Division
Jun 25, 2004 12:00:00 AM
DCMA Ground Systems and Munitions Division
Mar 30, 2005 12:00:00 AM
DCMA Aeronautical Systems Division
Sep 25, 2003 12:00:00 AM
DCMA Aeronautical Systems Division
Dec 4, 2003 12:00:00 AM
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Bottom
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Graphic 2.20: Report with All Data

Course Topics

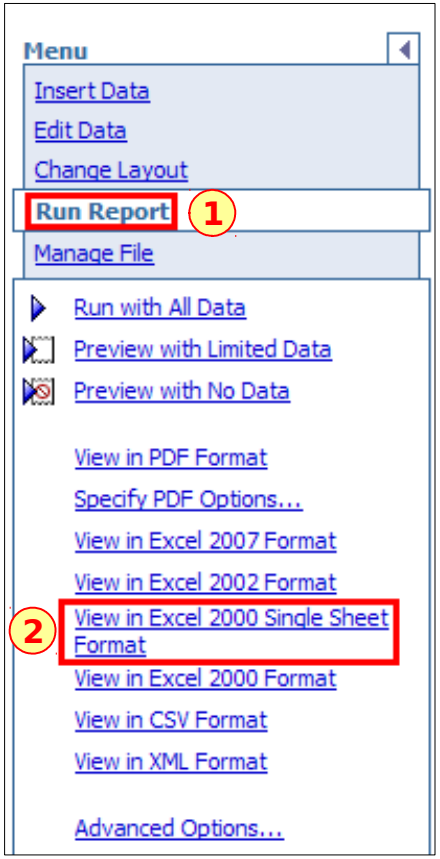
Topic Four – Running Ad hoc Reports

Exporting Data

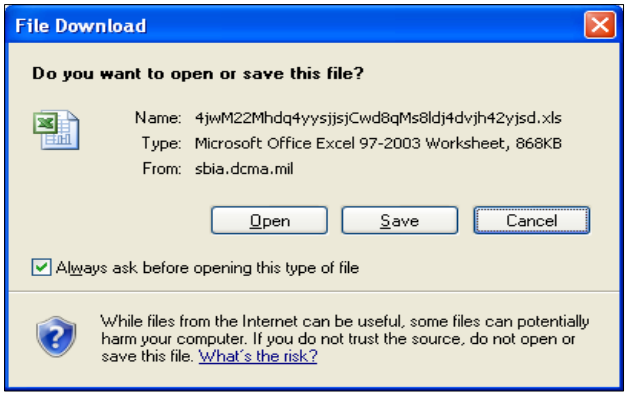
The second set of links of the **Run Report** Main Menu allow the report to be exported in PDF, Excel, CVS or XML format.

Note: Reports exported to PDF, Excel, CVS or XML format are saved to the users hard drive.

How to export report to Excel. (Graphics 2.21-2.23)	
1.	*Click* **Run Report**.
2.	*Select* **View in Excel 2000 Single Sheet Format**. •Click Open to view the Excel report •Click Save to save the report to your hard drive as an Excel file
3.	View the exported Excel spreadsheet.



Graphic 2.21: Ad hoc Run Report Menu


File Download
Do you want to open or save this file?
Name: 4jwM22Mhdq4yysjjsjCwd8qMs8ldj4dvjh42yjsd.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 868KB
From: sbia.dcma.mil
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Graphic 2.22: Report with All Data

	3 District	Audit Report Date
3		Sep 7, 2004 12:00:00 AM
4	DCMA Aeronautical Systems Division	Sep 26, 2001 12:00:00 AM
5	DCMA Aeronautical Systems Division	Sep 29, 2003 12:00:00 AM
6	DCMA Space and Missile Systems Division	May 10, 2005 12:00:00 AM
7	DCMA Aeronautical Systems Division	Nov 3, 2004 12:00:00 AM
8	DCMA Ground Systems and Munitions Division	Feb 14, 2005 12:00:00 AM
9	DCMA Aeronautical Systems Division	Mar 21, 2003 12:00:00 AM
10		Sep 29, 2003 12:00:00 AM
11	DCMA Naval Sea Systems Division	Mar 29, 2002 12:00:00 AM
12	DCMA Naval Sea Systems Division	Mar 31, 2004 12:00:00 AM
13	DCMA Space and Missile Systems Division	Jun 26, 2001 12:00:00 AM
14	DCMA Aeronautical Systems Division	Dec 17, 2002 12:00:00 AM
15	DCMA Aeronautical Systems Division	Jun 25, 2004 12:00:00 AM
16	DCMA Space and Missile Systems Division	Oct 1, 2004 12:00:00 AM
17	DCMA Aeronautical Systems Division	Dec 31, 2002 12:00:00 AM
18	DCMA Ground Systems and Munitions Division	Jun 17, 2003 12:00:00 AM
19	DCMA Aeronautical Systems Division	Aug 7, 2003 12:00:00 AM

Graphic 2.23: Report Exported to Excel

Module Two Review

Module Two Covered the Following Lessons:

Lesson One Overview of Ad hoc Reports

Lesson Two Query Studio